



User Reference Guide

ENTITY MANAGEMENT Create and Maintain Person Module 2

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COURSE OVERVIEW

Course Description

This process includes creating and maintaining people in WellSTAR. This includes Individuals and Users. An agent can also be designated using this process. Changes to the Security Assignments are not covered in this User Guide, but can be found in the WellSTAR for Administrators User guide.

1 CREATE AND MAINTAIN PERSON

This process will be used for creating, modifying and making Individuals or Users inactive. This process will be used to create People on behalf of the Organizations. This process is not used to create an Internal User. All Internal User accounts must be set up through the service desk. Instructions for adding a person as an Internal User are detailed in the WellSTAR For Administrators User guide.

Lesson Objectives:

- Search for a Person
- Create Person
- Modify Person
- Make person inactive

1.1 Search for an Individual or User

1.1.1 Key Points

- Always conduct a search in WellSTAR before adding or modifying any Person, Organization, etc.
- WellSTAR shows all DOGGR data, not just data for your District.

Entities Help

Organizations **People** Workgroups

Step 1 Step 2

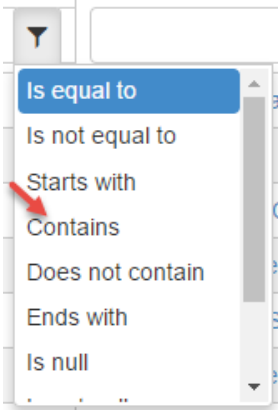
Advanced Filtering Actions Search

Name ↑	Primary Phone	WellSTAR User	Role(s)	Status Step 3
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Active
Aasia Newsome		Y		Active
Agent Form Test Test	(916) 666-6666	Y	Engineer	Active
Aj Ajduah		Y		Active
Ajay Bhat		Y		Active
Albus Dumbledore	(267) 578-1248	Y	Contact	Active
Amanda Parks		Y		Active
Anna Hinh		Y		Active
Annie Richardson		Y		Active

1 2 3 4 5 6 20 items per page Viewing 1 - 20 from 112 results

1.1.2 Steps to search for an Individual or User

Step	Action	Required Fields
1.	From the home page hover over Explore Data and select Entities . Then ensure that the People tab is selected. Note: when the page loads the Organizations tab will be selected by default.	
2.	Click Advanced Filtering	
3.	Delete Active from the Status search criteria. This step ensures that all People will be returned in the search results regardless of status. This is very important to prevent duplicates of People that already exist.	
4.	A. When Advanced Filtering is enabled, enter the search criteria in the appropriate search field. B. Click the filter <input type="text"/> icon and select the appropriate search condition:	

<ul style="list-style-type: none"> i. Is equal to: exact match ii. Is not equal: exclude exact match iii. Starts with: exact match of beginning string iv. Contains: exact match in any portion of search results (preferred) v. Does not contain: exclude exact match in any portion of search results vi. Ends with: exact match of end of string vii. Is null viii. Is not null ix. Is empty x. Is not empty 	
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1.2 Create Person in WellSTAR

1.2.1 Key Points

- A person is either an Individual (someone without WellSTAR access, but for whom there is contact information in the System), or a User (someone with access to WellSTAR and some level of Security Assignment).
- Once reviewed and approved through the WellSTAR review process an email will be sent to the new User with information regarding initial login.
- A Person is added through the Organization Questionnaire Section 3. People.
- This process will rarely need to be completed by DOGGR staff as Organizations can add people to their Organization through the Organization Questionnaire.
- This process can be used to associate a person who already existing in WellSTAR to an Organization.

Organization Questionnaire

Help

Form Navigation

- 1. Form Information

Form Information

Please enter information below. * Indicates required field

Form Name
Organization Questionnaire

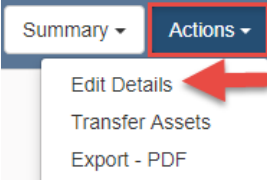
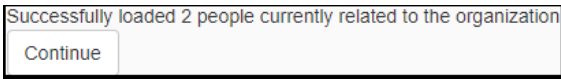
Do you currently operate, or intend to operate oil and gas wells or facilities in California?

Yes No

Description *

Cancel Save & Continue
←

1.2.2 Steps to create a Person


Step	Action	Required Fields
1.	Verify the Individual or User does not already exist by searching (see the Search lesson at the beginning of this user guide).	
2.	Look up the Organization the Person is to be added to. If the Organization does not exist create it using the steps outlined in the Create and Maintain Organization User Guide.	
3.	From the Operator detail page select the Actions button and Choose Edit Details . 	
4.	Section 1. Form Information , Create a Description .	Description
5.	Select Save and Continue .	
6.	Select section 3. People . The total number of people included in the Organization will be displayed. 	
7.	Select Continue .	

Organization Questionnaire - ABA Energy Corporation (A0150)

Help

Form ID: 533

Form Navigation


- 1. Form Information
- 2. Organization ✓
- 3. People 
- 4. Upload Documents
- 5. Form Submit
- 6. Confirmation
- 7. Review Comments
- 8. Reviewer Fields
- 9. Review

People

Enter Person information related to the Organization below. * Indicates required field

People * Add Person ▾

Name	WellSTAR User	Admin	Agent	Actions
A Irani	N	N	N	Action ▾
Melissa Irani	N	N	N	Action ▾
A. Irani	N	N	N	Action ▾
A. Irani	N	N	N	Action ▾



Back Next Save

Step	Action	Required Fields
8.	The People associated to this organization will be displayed in the People window. Click the Add Person button in the top right of the Person Window.	

Organization Questionnaire - Abalabi (10745)

Help

Form ID: 717

Form Navigation

- Form Information
- Organization ✓
- People**
- Upload Documents
- Form Submit
- Confirmation
- Review Comments
- Reviewer Fields
- Review

Person Info

* Indicates required field

Person Already Exists in WellSTAR
 Person Does Not Exist in WellSTAR

First Name *
 Middle Name
 Last Name *

Addresses

Phone Numbers

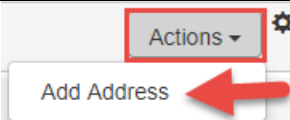
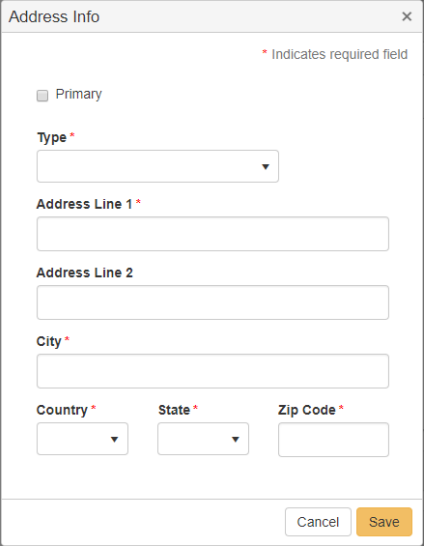
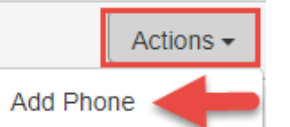
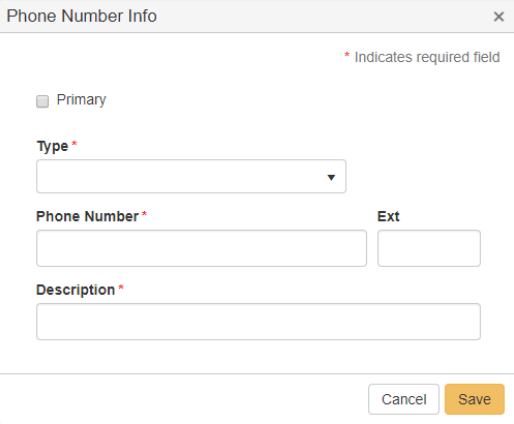
Email

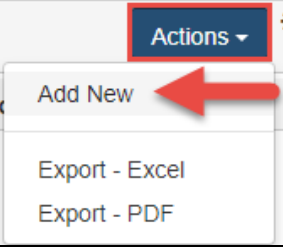
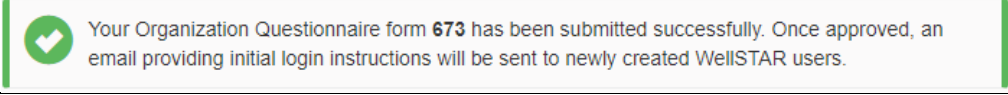
Relationship Types *
 Relationship Attributes WellSTAR User Admin

Role(s)

Back Next

9.	To create a new Person, change the radio dial to Person Does Not Exist in WellSTAR .	
	<p> <input type="radio"/> Person Already Exists in WellSTAR <input checked="" type="radio"/> Person Does Not Exist in WellSTAR </p> <p>Note: To add a person who already exists in WellSTAR, select the Person Already Exists in WellSTAR option and use the Find person box to search for the person.</p>	
10.	Enter the Person information.	First Name, Last Name,

	<p>Note: An email address must be entered for new Users. When the User is created WellSTAR will send an email to the new User with instructions on how to access the WellSTAR system.</p>	<p>If User: Email</p>
<p>11.</p>	<p>Add an Address by expanding the Addresses section using the arrow symbol ▼ and then using the Actions button to select Add Address.</p>	
<p>12.</p>	<p>Add the Address information.</p>	<p>Type, Address Line 1, City, Country, State, Zip Code</p> 
<p>13.</p>	<p>Select Save. Note: Multiple addresses can be added to the Person's profile, but only one can be marked as primary.</p>	
<p>14.</p>	<p>Add a Phone Number by expanding the Phone Numbers section using the arrow symbol ▼ and then using the Actions button to select Add Phone Number</p>	
<p>15.</p>	<p>Add the phone contact information.</p>	<p>Type, Phone Number, Description</p> 
<p>16.</p>	<p>Select Save. Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.</p>	

17.	Assign the new person a Relationship Type: Contact, Employee, Lease Contact, Production Contact, or Subcontractor.	
18.	If the new Person is a User, use the Relationship Attributes check boxes to select WellSTAR User . The new person may be given more than one Relationship Attributes by checking the box for more than one selection.	
19.	When data entry is complete click the Save button.	
20.	Navigate to section 5.Form Submit To associate a form that already exists in the WellSTAR system to this form (such as a bond information form): Use the Actions button to select Add New .	
21.	Select the form to be associated.	
22.	Select Save	
23.	To add a comment: Use the text box below the comments summary box.	
24.	Type your comment.	
25.	Check your content, spelling, and grammar.	
26.	Select Add Note: The comment will not be saved until you press Add. Comments cannot be edited or removed and are open to be viewed by all with access to WellSTAR. Ensure that your message is correct before selecting Add.	
27.	Check the “I hereby certify all statements made in this form are, to the best of my knowledge, true, correct and complete” box. Your name will appear in the submitter box. If you do not check the box you cannot submit the form. Note: Your name will be in the submitter box, even when you are submitting on behalf of the Organization. For this reason, you should upload a copy of the Email, or hard copy documentation that was sent to you prompting you to create the Organization.	Acknowledgment
28.	Preview your submission. Note: Previewing your submission will help ensure that you are comfortable with your acknowledgement made in the previous step prior to submitting the data.	
29.	6: Confirmation: view the confirmation to ensure the submission was successful. 	
30.	WellSTAR system sends email to new User Email Text: Welcome to WellSTAR. A request was received to create a WellSTAR login for you. Please use following username and password when logging into the system. You will then be prompted to change your password.	

	<p>URL: www.WellSTAR.com Username: {username} Password: {tempPassword}</p> <p>If you did not make this request please contact the WellSTAR Administrator at (916) 555-1212.</p>	
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1.3 Modify Individual or User

1.3.1 Key Points

- There are two ways to edit a Person in WellSTAR. A Person can be looked up and edited directly (Option One) or can be edited as part of the Organization (Option Two). A Person's relationship with that Organization can only be changed through Option Two.
- External Users can have their organization admin make changes to their profile, so this process will be used rarely by DOGGR Staff.
- Modifying through the Person Detail page does not trigger the review process.

1.3.2 Option One: Steps to modify Person information

Note: you cannot associate or disassociate a person from an Organization or alter their relationship with that Organization through this process. To alter Organization related Person information proceed to Option Two below in this user guide.

Person Detail Edit

Help

Jeanette McCracken
Actions ▾

First Name *	Middle Name	Last Name *
<input type="text" value="Jeanette"/>	<input type="text"/>	<input type="text" value="McCracken"/>
Email	Status	WellSTAR User
<input type="text" value="Jeanette.mccracken@conservation.ca.gov"/>	<input type="text" value="Active"/>	<input type="text" value="Yes"/>

Associated Addresses Add Address ▶

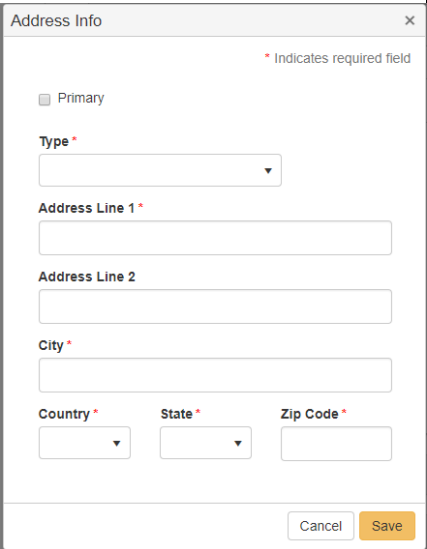
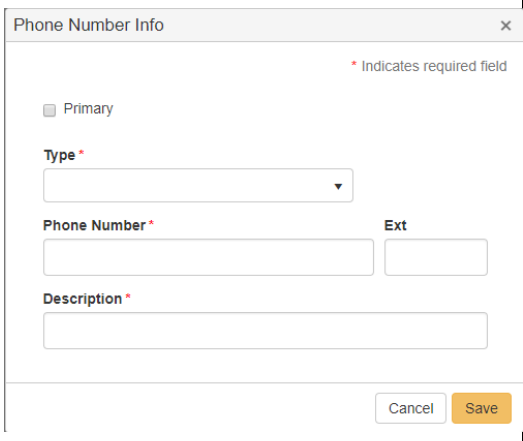
Associated Phone Numbers Add Phone Number ▶

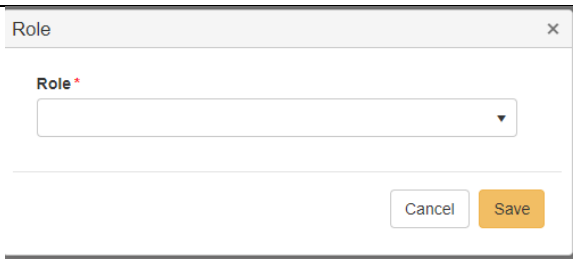
Associated Roles Add Role ▶

Associated Organizations ▶

Cancel Save

Step	Action	Required Fields
1.	Search for the Person as shown in the Search lesson at the beginning of this user guide.	

2.	Select a record to modify by clicking on the Name .	
3.	Use the Actions button to select Edit Details .	
4.	Edit any of the heading information by clicking the box of the field to be edited.	
5.	Add an Address by selecting the Add Address button.	
6.	Add the Address information.	 <p>Type, Address line 1, City, Country, State, Zip Code</p>
7.	<p>Select Save.</p> <p>Note: Multiple addresses can be added to the Person’s profile, but only one can be marked as primary.</p>	
8.	Add a phone number by selecting the Add Phone Number button.	
9.	Add the phone number information	 <p>Type, Phone Number, Description</p>
10.	<p>Select Save.</p> <p>Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.</p>	
11.	Add an associated role by selecting the Add Role button.	

12.	Add the Role information.		Role
13.	Select Save . Note: A person may have many roles. These roles are not related to the Security Assignments for the WellSTAR system.		
14.	Select Save on the Person Detail Edit page to save and exit editing.		

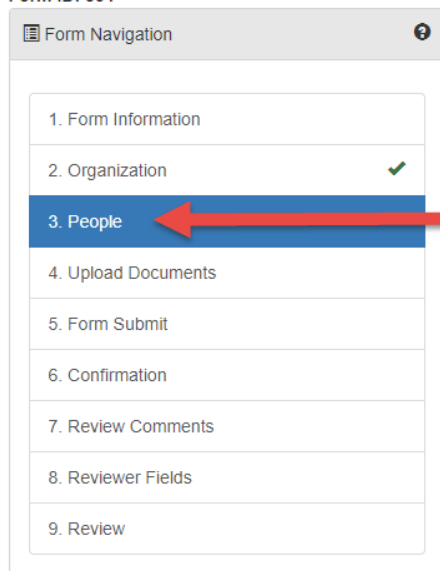
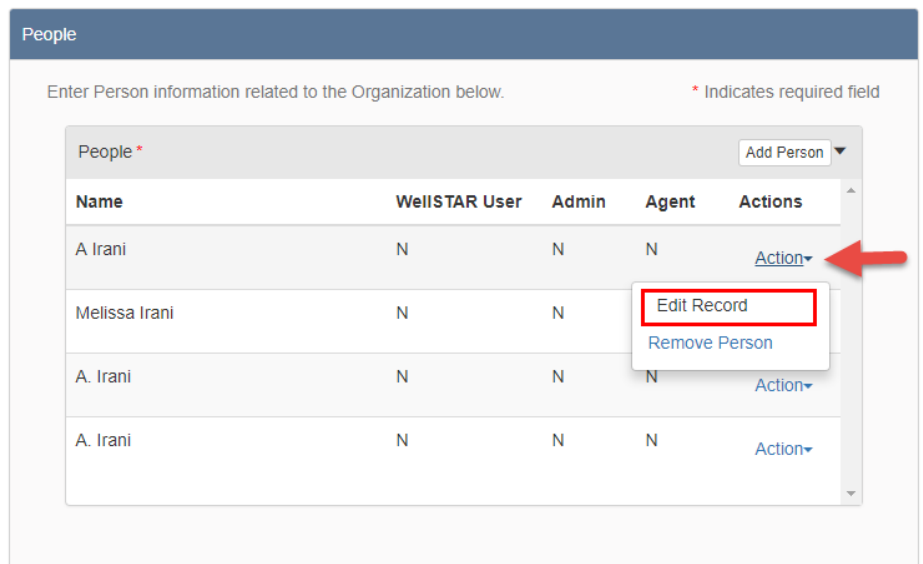
1.3.3 Option two: Steps to modify Person information

Note: Through this process the relationship between a person and an Organization can be updated.

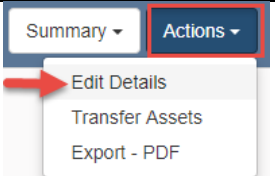
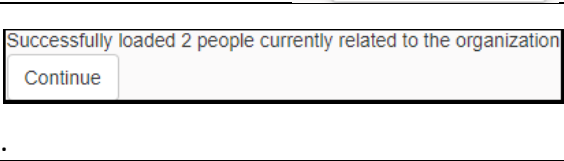

Organization Questionnaire - ABA Energy Corporation (A0150)

Help

Form ID: 534

Step	Action	Required Fields
1.	Search for the Organization associated with the Person to be edited.	
2.	Select the Organization record by clicking on the Name .	

<p>3.</p>	<p>Use the Actions button to select Edit Details.</p>		
<p>4.</p>	<p>Open section 3. People The total number of people included in the Organization will be displayed. Select Continue below this statement.</p>		
<p>5.</p>	<p>The People associated to this organization will be displayed in the People window. Click the Action link right of the name of the person to be edited. From the actions menu, you may Edit Record or Remove Person. Note: Removing a person does not delete them from WellSTAR, it sets their association to this Organization to Inactive.</p>		
<p>6.</p>	<p>Select Edit Record.</p>		

Organization Questionnaire - Abalabi (10745)

Help

Form ID: 717

Form Navigation

1. Form Information
2. Organization ✓
3. People
4. Upload Documents
5. Form Submit
6. Confirmation
7. Review Comments
8. Reviewer Fields
9. Review

Person Info

* Indicates required field

Person Already Exists in WellSTAR
 Person Does Not Exist in WellSTAR

First Name *
Middle Name
Last Name *

Addresses ▶

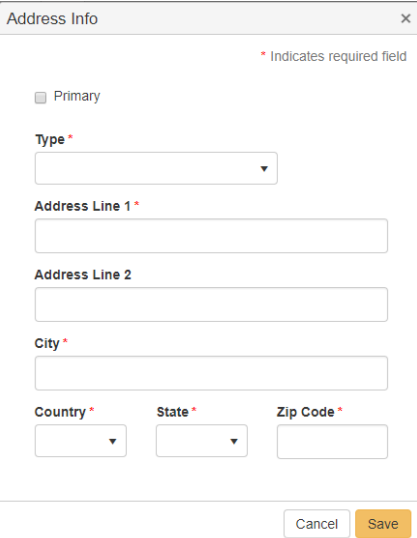
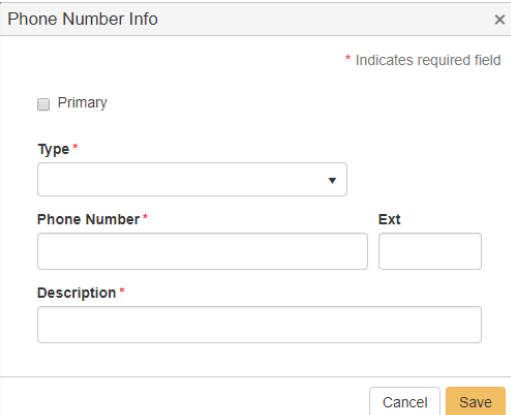
Phone Numbers ▶

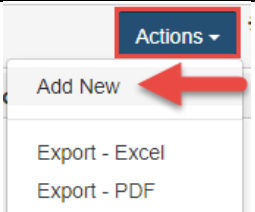
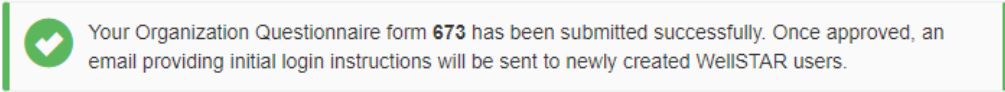
Email

Relationship Types *
Relationship Attributes
 WellSTAR User
 Admin

Role(s)

7.	Edit any of the heading information by clicking the box of the field to be edited.	
8.	Add an Address by selecting the Add Address button.	

<p>9.</p>	<p>Add the Address information.</p>		<p>Type, Address line 1, City, Country, State, Zip Code</p>
<p>10.</p>	<p>Select Save. Note: Multiple addresses can be added to the Person’s profile, but only one can be marked as primary.</p>		
<p>11.</p>	<p>Add a phone number by selecting the Add Phone Number button.</p>		
<p>12.</p>	<p>Add the phone number information.</p>		<p>Type, Phone Number, Description</p>
<p>13.</p>	<p>Select Save. Note: Multiple phone numbers can be added to the Organization, but only one can be marked as primary.</p>		
<p>14.</p>	<p>To associate a relationship type, click in the Relationship Type box and select from the drop-down menu.</p>		
<p>15.</p>	<p>Change Relationship Attributes as needed by checking or unchecking the boxes. Note: This includes making a person the Agent of the Organization.</p>		
<p>16.</p>	<p>To associate a role, click in the Roles box and select from the drop-down menu.</p>		
<p>17.</p>	<p>Select Save on the 3. People Section of the form.</p>		

18.	<p>Navigate to section 5.Form Submit To associate a form that already exists in the WellSTAR system to this form (such as a bond information form): Use the Actions button to select Add New.</p>		
19.	Select the form to be associated.		
20.	Select Save		
21.	To add a comment: Use the text box below the comments summary box.		
22.	Type your comment.		
23.	Check your content, spelling, and grammar.		
24.	Select Add Note: The comment will not be saved until you press Add. Comments cannot be edited or removed and are open to be viewed by all with access to WellSTAR. Ensure that your message is correct before selecting Add.		
25.	Check the “I hereby certify all statements made in this form are, to the best of my knowledge, true, correct and complete” box. Your name will appear in the submitter box. If you do not check the box you cannot submit the form. Note: Your name will be in the submitter box, even when you are submitting on behalf of the Organization. For this reason, you should upload a copy of the Email, or hard copy documentation that was sent to you prompting you to create the Organization.		Acknowledgement
26.	Preview your submission. Note: Previewing your submission will help ensure that you are comfortable with your acknowledgement made in the previous step prior to submitting the data.		
27.	6: Confirmation: view the confirmation to ensure the submission was successful. 		

1.4 Make Individual or User Inactive

1.4.1 Key Points

- If active tasks are associated with a User, WellSTAR prevents the inactivation of the User and displays a message.
- When made inactive, Individuals and Users are still associated to the Organization in the system, but are not active. No information is deleted.
- WellSTAR shows all DOGGR data, not just data for your District.

1.4.2 Steps to Make Individual or User Inactive

Home | Entities | Ariel Pruitt

Person Detail

Help

The screenshot shows the 'Person Detail' page for Ariel Pruitt. At the top, there is a navigation bar with 'Home | Entities | Ariel Pruitt' and a 'Help' button. Below this is a header for 'Ariel Pruitt' with 'Summary' and 'Actions' dropdown menus. The main content area is divided into sections: 'User Information' (Ariel Pruitt), 'Phone', 'Email' (Ariel.pruitt@conservation.ca.gov), and 'Status' (Active). A red box highlights the 'Status' field, and a red arrow points from it to the 'Actions' dropdown menu, which is open showing 'Edit Details' and 'Export - PDF' options. Below these are sections for 'Associated Addresses', 'Associated Phone Numbers', 'Associated Roles', 'Associated Organizations', 'Associated Workgroups', and 'Comments'.

Step	Action	Required Fields
1.	Search for the Person as shown in the Search lesson at the beginning of this user guide.	
2.	Select a Person to become inactive by clicking on the Name .	
3.	Use the Actions button to select Edit Details .	
4.	Set the Status to Inactive . Note: A User cannot be made inactive if they have any tasks associated with them. This rule applies to Internal Users only, as External Users cannot be assigned tasks. No tasks can be associated to this User.	
5.	Click the Save button to save changes and close out of editing.	

1.5 Review Person Data submissions through the Organization Questionnaire

1.5.1 Key Points

- All comments are public and cannot be edited after they are saved. Use good judgement before adding a comment.
- This is the same process described in the Create and Maintain Organization User Guide lesson 1.5.


1.5.2 Steps to Review Person Data Submissions though the Organization Questionnaire

- Always assign the task to yourself before working on the task.

The screenshot shows the WellSTAR web application interface. At the top, there is a navigation bar with 'WellSTAR' logo, a search bar, and menu items: 'Home', 'Explore Data', 'Forms', 'Tools', and 'Maps'. Below the navigation bar, the user is logged in as 'Hello Jeanette McCracken, Department of Conservation'. The main content area shows a 'Home' heading and a 'MyTasks' tab selected. Below the tabs, there is a table of tasks. The first row of the table is highlighted with a red box. The table has columns for Task Name, Organization, Status, Workgroup, Assigned To, Due Date, and Actions.

Task Name	Organization	Status	Workgroup	Assigned To	Due Date	Actions
Review Organization Information	abalabi Energy Inc	In Progress	Entity Information Change Review	Jeanette McCracken	01/31/2018	Actions>
Review Organization Information	Silk Gas Storage	In Progress	Entity Information Change Review	Jeanette McCracken	01/31/2018	Actions>
Review Organization Information	Department of Conservation	Not Started	Entity Information Change		12/15/2017	

1.5.3 Steps to Review External Organization Data submissions

Step	Action	Required Fields
1.	Navigate to the My Tasks page. Note: This is your WellSTAR home page, so pressing the Home icon  will take you to the My Tasks page.	

2.	Search for the task, using Advanced Filtering if needed.	
3.	Select the Review Organization Information task to be reviewed.	
4.	Select the Task Name to view the Task Detail page.	

Task Detail

[Help](#)

Task Type
System Generated

Task Name
Review Organization Information

Description
Department Review of submitted OFD001 information.

All comments are discoverable records, open to public review.

Organization
Silk Gas Storage

Status
In Progress

Workgroup
Entity Information Change Review

Assigned To
Jeanette McCracken

Due Date
01/31/2018

Created Date
12/04/2017

Created By
jeanTRN mcracken07

Form

OFD001 - Organization Questionnaire

Comments

20 items per page

All comments are discoverable records, open to public review.

Task History

Date	Description
01/22/2018 10:09:56 AM	Jeanette McCracken changed the Due Date to 1/31/2018 12:00:00 AM.
	Jeanette McCracken changed the Assigned to

Step	Action	Required Fields
5.	Select Edit button	
6.	Change the Assigned To box to your name Note: the status will automatically change to In Progress.	Status

7.	Select Save	<input type="button" value="Cancel"/> <input type="button" value="Save"/>	
8.	Select the blue Form hyperlink to review the form.		

Form ID: 525

Form Navigation

- 1. Form Information
- 2. Organization
- 3. People
- 4. Upload Documents
- 5. Form Submit
- 6. Confirmation
- 7. Review Comments
- 8. Reviewer Fields
- 9. Review

Review Comments

Comments

01/22/2018 10:10:26 AM : Jeanette McCracken , Department of Conservation
Sent in VIA email

◀ ◁ 1 ▷ ▶
20 Items per page
Viewing 1 - 1 from 1 results
↻

All comments are discoverable records, open to public review.

Step	Action	Required Fields
9.	Review the data submitted by the Organization.	
10.	7. Review Comments To add a comment: Use the text box below the comments summary box.	
11.	Type your comment.	
12.	Check your content, spelling, and grammar.	
13.	Select Add Note: The comment will not be saved until you press Add. Comments cannot be edited or removed and are open to be viewed by all with access to WellSTAR. Ensure that your message is correct before selecting Add.	

Release 2.0 EM 02 Create and Maintain Person

Form ID: 525

Form Navigation

1. Form Information
2. Organization
3. People
4. Upload Documents
5. Form Submit
6. Confirmation
7. Review Comments
8. Reviewer Fields
9. Review

Reviewer Fields

Enter information related to the Organization below. * Indicates required field

Organization Status *

Active ▼

Financial Status *

Active ▼

Back Next Save

Step	Action	Required Fields
14.	<p>8. Reviewer Fields</p> <p>Change the Organization Status or Financial Status as needed.</p> <p>Note: This change is not subject to a review, as it is part of the review. Ensure that you need to alter either of these fields before you make any changes to these fields.</p>	

Organization Questionnaire - Abalabi (10745)

Help

Form ID: 673

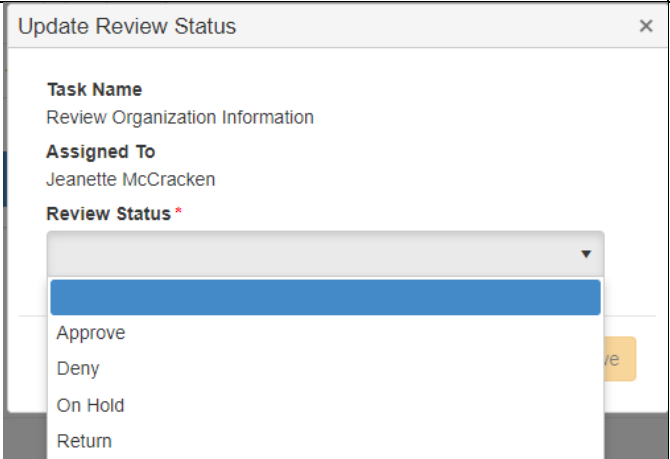
Form Navigation

- 1. Form Information
- 2. Organization
- 3. People
- 4. Upload Documents ✓
- 5. Form Submit
- 6. Confirmation
- 7. Review Comments ✓
- 8. Reviewer Fields
- 9. Review

Review						
Task Name	Workgro...	Assigne...	Created	Last Upd...	Review ...	Actions
Review Organization Information	Entity Information Change Review		01/19/2018 11:52 AM	01/19/2018 11:52 AM		Actions

◀ 1 ▶ 10 items per page Viewing 1 - 1 from 1 results

Back Close

Step	Action	Required Fields
15.	<p>9. Review</p> <p>Use the Action blue link to select Update Review Status. Note: Is the Actions button is greyed out you must first go Claim the task. If you missed this step you can use the Task Name blue hyperlink to go to the task and claim it. Once claimed, refresh the Section 9. Review page and you will be able to interact with the Actions button for that task.</p>	
16.	<p>Set the Status as appropriate: Approve, Deny, Return, On Hold. Note: The task assigned to you in step 5 of this lesson will automatically be completed once you change the Status of the form from this section. There is no need to return to the original task.</p>	
17.	<p>WellSTAR will notify the Organization about the status of the change, and if the change was approved, WellSTAR will update the data.</p>	